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## Diversification as a Strategy: A Research-Based Plan to Cultivate New Audiences at the Richmond Symphony


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# DIVERSIFICATION AS A STRATEGY

A RESEARCH-BASED PLAN TO CULTIVATE NEW  
AUDIENCES AT RICHMOND SYMPHONY

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THE DOCTOR OF EDUCATION CAPSTONE PROJECT OF  
VERONA WILBORN, FRANK WEBER, JIM PERKINS, AND KEITH CLAASSEN



# CAPSTONE COMMITTEE

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*We are indebted to our capstone chair for challenging our thinking and facilitating our individual and collective growth:*

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*We would like to thank both members of the capstone committee for their brilliance, expertise, and invaluable guidance:*

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# RICHMOND SYMPHONY

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*We recognize the following Richmond Symphony leadership team members for their participation in this capstone project:*

*David J. L. Fisk  
Executive Director*

*Walter Bitner  
Director of Education and Community Engagement*

*Jennifer Arnold  
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*Jonathan Sanford  
Education Coordinator*

*Members of the Diversity, Equity, and Inclusion Committee*

*Members of the Audience Building Committee*

# CAPSTONE TEAM VISION

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*To be a catalyst for change.*

# TABLE OF CONTENTS

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Executive Summary	vii
Introduction	1
Data-Based Analysis and Decision-Making	7
Background: Audience Diversification	25
Background: Organizational Project Management	35
Background: Change Management	41
Recommendations	45
Resources	55
Notes	59
References	63
Capstone Team	66

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# EXECUTIVE SUMMARY

*“Diversification is a performance strategy, not a performance goal.”*

Dr. Aashir Nasim, Ph.D.

The Richmond Symphony, like many other arts organizations nationwide, has identified increasing audience diversity as a priority. You have noted that in your experiences, symphonic music attracts a specific cultural niche: mature, white affluent patrons. Realizing that this demographic results in a homogeneous audience, you committed to find ways for your audience to more accurately reflect local demographics, specifically in regard to race and age diversity.

This Capstone report was created to provide you a perspective that can inform your plan to attract diverse audiences. It is the culmination of a 9-month series of meetings, focus groups, interviews, data analyses, and a thorough review of existing literature that is designed to guide you in taking your next steps toward your Diversity and Inclusion strategic goal that “the symphony will look, feel, and be distinctly different from today, to better reflect the communities [you] seek to serve.”<sup>1</sup> Our report layers four research-based approaches that, if used simultaneously, have the potential to both increase the likelihood of audience diversity success and decrease the amount of time it will take to achieve positive results.

This report includes the following sections: an analysis of existing Etix and Census Bureau data to document which communities you currently serve and the



demographics of those communities; nine research-based recommendations highlighting which efforts to prioritize in moving toward audience diversification; a framework for how to organize and implement the recommendations using an Organizational Project Management (OPM) approach; two models for managing change efforts and resistance; and a full literature review on each of the three domains: audience diversification best practices, organizational project management, and change management.

Perhaps the most immediate piece of information highlighted in this Capstone report is the identification of audience diversification targets based on community racial demographics as well as baseline data from the 2018-2019 season. This information quantifies the gap between where you currently stand in respect to your Diversity and Inclusion strategic goal and the progress that needs to be made.

From the research, we developed nine recommendations the Symphony should prioritize in order to close that gap:

1. Data-Based Analysis and Decision-Making
2. Establish a Solid Foundation
3. Get to Know Your Present and Future Audiences
4. Build Meaningful Relationships
5. Purposeful Marketing and Strategic Programming
6. Prepare for Your Success
7. Success Metrics
8. Implement a Tailored OPM Framework
9. Implement Change Management Models

The first recommendation is the result of analyzing current Etix survey data, which was found to be insufficient for data disaggregation and long-term progress monitoring. Recommendations 2-7 emphasize themes found across seven frameworks for audience diversification that have proven to produce positive results within 10 years in arts organizations across the country. Recommendation 8 recognizes that small organizations find it challenging to execute their strategies because they do not have an efficient and effective process infrastructure in place. Generally, organizations with excellent project management practices meet project goals 92% of the time.<sup>2</sup> The final recommendation stems from evidence that successful transformation is highly influenced by balancing the art of leadership with management; organizations with excellent change management processes are six times more likely to meet objectives, with nearly 70% finishing ahead of schedule.<sup>3</sup>



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# 1

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## INTRODUCTION

In this chapter we describe the research problem and the Richmond Symphony's purpose for diversifying its audience. We briefly describe the methods taken to gather data as well as provide an overview of the format of this report.



## SECTION 1

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# INTRODUCTION

*“We decided that we had no choice but to plunge into the community with a completely unapologetic attitude toward our art.”*

Bruce Coppock

Building more inclusive audiences is not a far-fetched idea or out of reach goal. It requires well laid out plans, achievable goals, effective processes, and a total organizational commitment to diversification.

In the early 1990s, the St. Louis Symphony Orchestra, the second-oldest symphony orchestra in the United States, was facing extinction because of decreasing funding due to a declining audience base. They determined a change was required in order to save the symphony. Bruce Coppock, former executive director of the symphony, stated in a speech given at the 1995 Grantmaker in the Arts annual conference:

“Changing a few concert formats wouldn’t solve the problem; changing the fundamental nature, but not the content, of the symphony’s interaction with the community might. We decided that we had no choice but to plunge into the community with a completely unapologetic attitude toward our art, as self-effacing missionaries for that art, seeking to build as many points of connection as we could find. By engaging in comprehensive, ambitious audience development, we’re



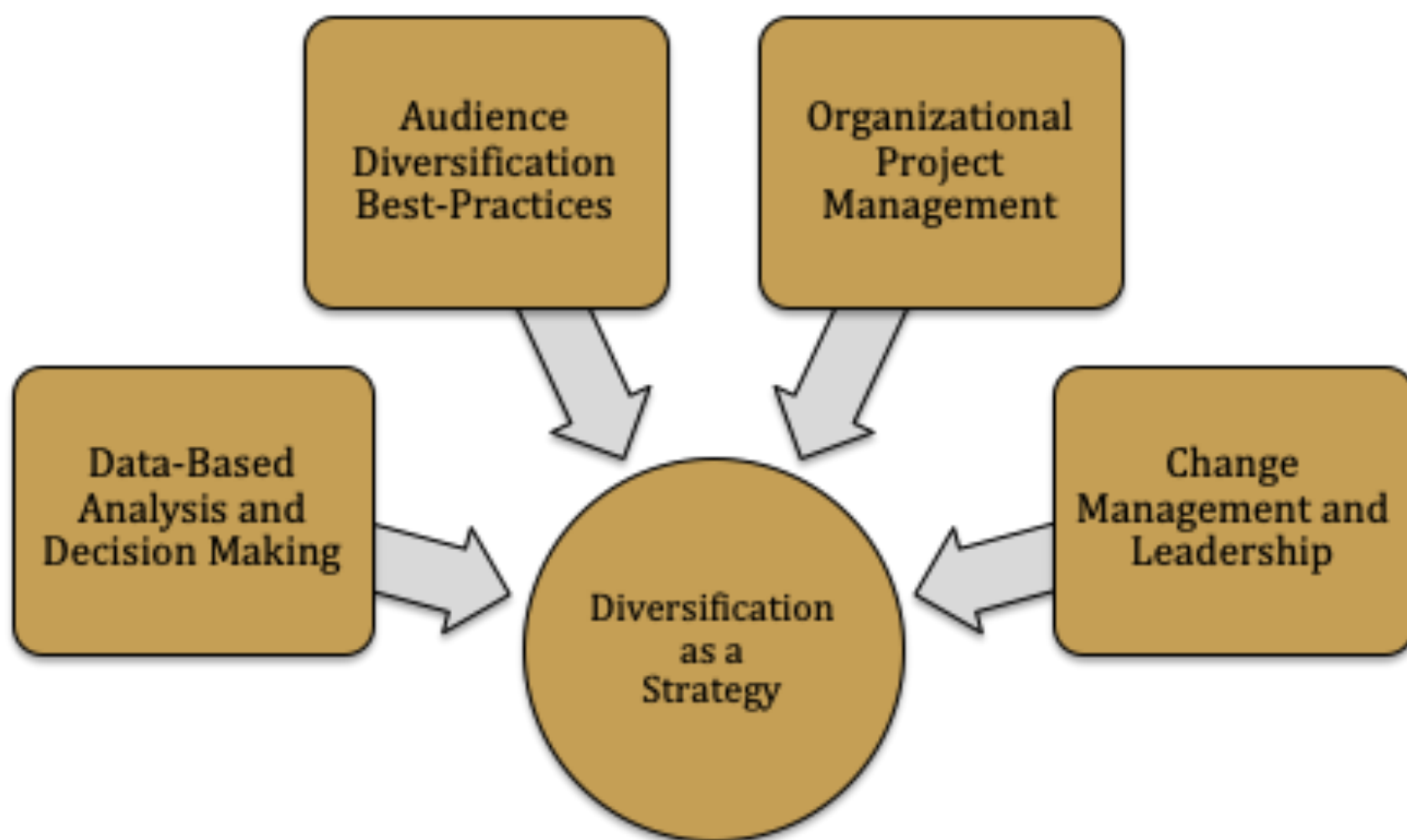
inculcating [audiences] with the innately infectious nature of our art. We are actively involved in building our own infrastructure for broad-based support down the line while providing service to the community in the near term. If we do our job in the trenches now, the question of our relevance will be moot in twenty-five years.”<sup>4</sup>

Today, after years of work in audience diversification efforts, the Grammy Award winning Orchestra is world acclaimed, recognized for its commitment to educational and community outreach efforts.<sup>5</sup>

The Richmond Symphony, like many other arts organizations nationwide, including the St. Louis Symphony Orchestra, has identified

increasing audience diversity as a priority.<sup>6</sup> Symphonic music attracts a traditional audience of specific ages, races, and socioeconomic status, namely a mature, Caucasian, affluent audience.<sup>7</sup> Realizing this demographic results in a homogeneous audience, you and other artistic organizations with similar audiences are attempting to find ways to better reflect the areas you serve and, thereby, diversify your audiences.

We, the Virginia Commonwealth University (VCU) Capstone Team, created this report to assist you in your effort to build a more diverse audience as part of your 2016-2022 Strategic Plan. Our plan is unique in that it layers four approaches that, if used simultaneously, have the potential to both increase the



likelihood of success and decrease the amount of time it will take to achieve results.

According to your Request for Assistance (RFA), you are interested in further building your audience at classical repertoire events, specifically focusing on increasing the diversity,

overall knowledge of the request by your leaders, which was understandable given the turnover of your personnel during summer 2019. Through the RFA and multiple meetings with your leadership, we were able to more clearly define the purpose of the study. Many good purposes were discussed in those

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*“If we do our job in the trenches now, the question of our relevance will be moot in twenty-five years.”*

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equity, and inclusion of audience members in order to be more reflective of the communities you seek to serve. As an initial effort to address these issues, in 2016 you created the Audience Building Committee (ABC) and the Diversity, Equity, and Inclusion (DEI) Committee. The ABC focuses on building your audience and donor base, while making special efforts to attract the next generation of attendees, advocates, and supporters.<sup>8</sup> The DEI committee’s purpose is to identify specific ways to grow audience diversity.<sup>9</sup> To continue building upon these initial efforts, David Fisk, Executive Director, asked us for an “objective, academic-centered focus”<sup>10</sup> on audience diversification.

We were confronted with mixed requests for the work as well as lack of

meetings and back and forth dialogue helped us identify which of these purposes we could reasonably address. In order to arrive at the scope of work, we identified the many requests as either in-scope or out-of-scope which resulted in agreement on the work.

This report is in response to the RFA and is the culmination of a 9-month series of meetings, focus groups, interviews, data analyses, and a review of existing literature designed to guide you in taking your next steps towards the Diversity and Inclusion strategic goal that “the symphony will look, feel, and be distinctly different from today, to better reflect the communities we seek to serve.”<sup>11</sup>

This report includes the following four sections:



- An analysis of existing data to document who the Symphony serves
- Recommendations based on best practices to achieve the strategic goal that “the symphony will look, feel, and be distinctly different from today, to better reflect the communities we seek to serve”<sup>12</sup>
- A process framework for implementing recommendations
- A literature review on diversification best practices, organizational project management, and change management



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## 2

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# DATA-BASED ANALYSIS AND DECISION-MAKING

In this chapter we disaggregate existing Richmond Symphony survey data to better understand the current audience. We use the United States Census Bureau projections from the American Community Survey to establish a baseline from which growth can be measured.



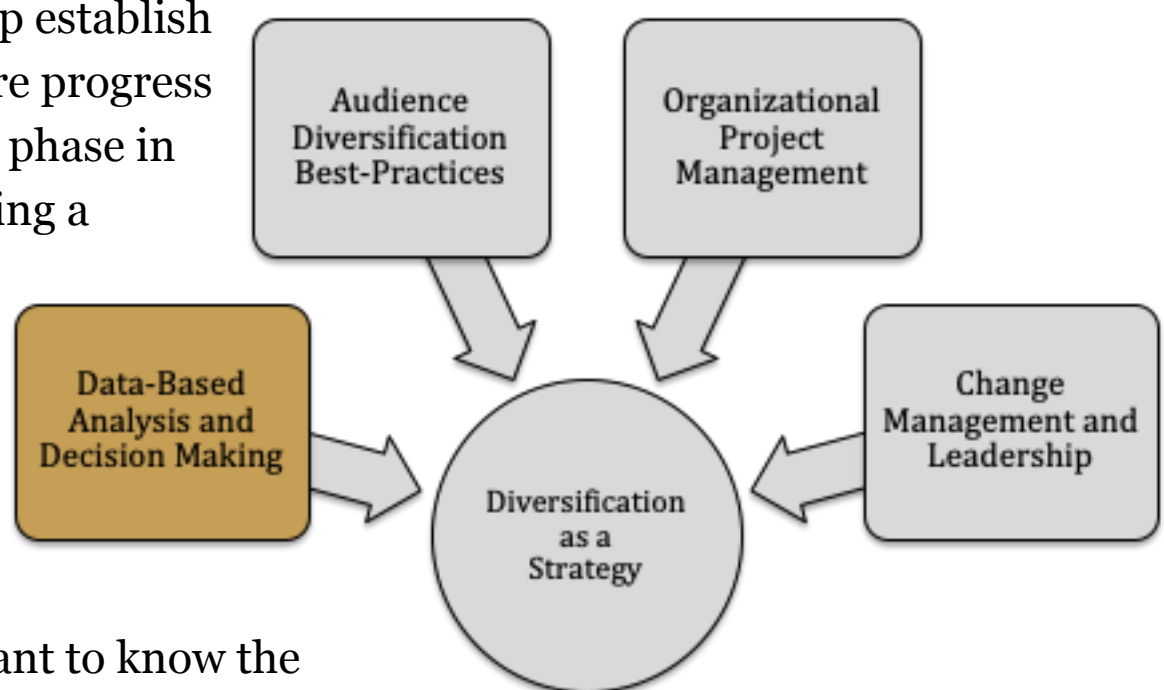
## SECTION 2

# DATA-BASED ANALYSIS AND DECISION-MAKING

*“The organizations studied mostly focused on attendance data... to gauge the effectiveness of their initiatives. That is understandable since visits, especially repeat visits, are an important measure of audience participation.”*

Dr. Bob Harlow, Ph.D.

As with any other organization, the starting point is to take a deeper look into your existing data to better understand which variables you have, how those variables can be used, and if they can help establish a baseline from which future progress can be measured. The first phase in developing and implementing a change plan is to document and understand the starting point; in other words, the organizational baseline. In the case of audience diversification, it is important to know the profile of the current audience. Knowing which information to seek and how that information can help the organization succeed,





especially in the area of strategic planning, can turn vast databases into strategic data that can inform decision-making and drive progress.

In this section, data from two databases were disaggregated. We used your survey data from the Etix database to understand what the existing data says about your current audience. We also used the 2018 demographic estimates from the Census Bureau's American Community Survey database to understand the demographics of the area in order to provide baseline information for developing strategic goals towards audience diversification. It is worth noting that this year is a Census year, and these baseline data should be updated following the 2020 census.

## Etix Data Set

For this project, we disaggregated Etix data for the Symphony's three classical repertoire venues for the 2018-2019 season. These venues included the Masterworks at the Carpenter Theater, which has a capacity of 1,800 seats for 11 performances for the season; the Metro Collection at Randolph-Macon College Blackwell Auditorium, which has a capacity of 600 seats for 4 performances for the season; and the Rush Hour at Hardywood Craft Brewery Taproom, which has a capacity

of 300 people for 4 performances for the season.

The 2018-2019 season was selected for several reasons. First, the current 2019-2020 season may be an audience anomaly because of the international attention from both the Menuhin competition and the auditions of each music director candidate. Second, because the second half of the 2019-2020 season was canceled, the 2018-2019 data provide a picture of a complete season. It would be useful to compare the 2022-2023 data (the first year of your updated strategic plan) with 2018-2019 to see if the diversity in the music director candidates, along with other initiatives, resulted in a different audience than in prior years.

## Exporting Etix Data

The Etix database allows exporting at two levels: the venue level and the performance level. The venue level includes all performances for a season that occurred at the same place, while the performance level holds data for a single event. The data that is available for export is different between both levels. Variables that are the same for the venue and performance level reports for the Carpenter Theater include:

- Performance Name
- Performance Date
- Order ID
- Date Purchased

- Number of Tickets
- Name
- Email
- Phone #
- How did you hear about this concert?
- If other, please list
- Which category below includes your age?
- Please indicate your ethnic background
- If other, please specify
- Is this your first time purchasing tickets for the Richmond Symphony?
- Serial #
- Section
- Row
- Seat

Variables that are unique for the venue and performance level reports for the Carpenter Theater are listed in Table 1. The differences between the data available at the venue and performance level is important for understanding the intersection of where the audience members reside (data in the venue level

**TABLE 1**  
*Comparison of variables that are unique for the venue and performance level reports for the Carpenter Theater*

Venue Level Data	Performance Level Data
Street Address	Price Code
City	Redeemed Status
Country/Territory	
Zip Code	
Company/Group	
Performance Time	

report) and if their tickets were redeemed at the event (data in the performance level report). To remedy this issue, we merged the performance level data into the venue level report so that all variables were available in one file.

## Historical Ticket Data

The Symphony’s three classical repertoire venues include the Carpenter Theater (Masterworks), Randolph-Macon College Blackwell Auditorium (Metro), and Hardywood Craft Brewery Taproom (Rush Hour). There were eleven performances of eight Masterworks concerts; Masterworks 3, 5, and 7 each had a Saturday and Sunday performance, which doubled the total capacity, while all other Masterworks performances were on Saturday only.

Table 2 shows the seating capacity at each concert as well as the number of individual ticket orders, the number of



**TABLE 2**

*Seating capacity, number of individual ticket orders, the number of tickets sold, the number of tickets redeemed, and the percentage of tickets redeemed at each performance*

Performance	Capacity	Individual Orders	Tickets Sold	Tickets Redeemed	
				n	%
Carpenter Theater					
Masterworks 1	1,800	808	1,720	1,614	94
Masterworks 2	1,800	268	1,244	973	78
Masterworks 3	3,600	605	1,955	1,562	80
Masterworks 4	1,800	316	1,393	973	70
Masterworks 5	3,600	295	1,737	1,364	79
Masterworks 6	1,800	308	1,590	1,248	78
Masterworks 7	3,600	326	1,641	1,189	72
Masterworks 8	1,800	405	1,587	1,285	81
Total	19,800	3,331	12,867	10,208	*79
Randolph-Macon College					
Metro 1	600	122	275	213	77
Metro 2	600	104	420	379	90
Metro 3	600	58	326	228	70
Metro 4	600	65	325	226	70
Total	2,400	349	1,346	1,046	*78
Hardywood Brewery					
Rush Hour 1	300	124	228	224	98
Rush Hour 2	300	107	269	235	87
Rush Hour 3	300	78	177	136	77
Rush Hour 4	300	78	242	163	67
Total	1,200	387	916	758	*83

*Note.* All percentages are rounded to nearest whole number. Masterworks 3, 5, 7 each had two performances, which doubled the venue capacity.

\* indicates an average

tickets sold, the number of tickets redeemed, and the percentage of tickets redeemed. For the Masterworks season 3,331 people purchased 12,867 tickets, and 10,208 of those tickets (79%) were

redeemed on the day of the performance. Of the tickets sold for Metro performances, 78% were redeemed. For the Rush Hour season 83% of tickets sold were redeemed.

The number of individual orders is important information because it shows the number of ticket purchasers who were presented with the Etix survey. Since only ticket purchasers had the option of taking the survey and reporting their age and race, we excluded all additional tickets from the same order. In a socially race segregated society, one assumption is that the ticket purchaser is likely to be attending with those of a similar race. We did not want to include assumptions in our analysis and, thus, did not identify other ticket holders with the same race characteristics as the ticket purchaser.

## Race

On the Etix survey, ticket purchasers are asked to identify their race. Options on the survey include: American Indian or Alaskan Native, Asian, Black or African-American, Hispanic, Native Hawaiian or other Pacific Islander, Other, White, and Choose Not to Respond. In the table below, we also include the total number of people who selected a race and the number of people who left the question blank.

The difference between choosing not to respond and leaving the question blank may be meaningful. If “Choose Not to Respond” is selected, that individual purposefully chose to keep his/her race private, while an individual

who left the question blank may have made the decision not to respond to the question or they skipped non-mandatory survey questions.

The tables in this section focus on only the ticket purchasers who redeemed their tickets on the day of the performance. Table 3 shows the number of purchasers who redeemed their tickets and selected a race, left the question blank, or chose not to respond for each Masterworks and Metro performance. Demographic data were not available for Rush Hour performances at Hardywood Craft Brewery. On average, 46% of ticket purchasers who redeemed their tickets at Masterworks performances selected a race, compared to 38% at Metro performances.

Focusing on the Carpenter Theater, for the 1,166 people who did select a race, we dug deeper to see the racial profile of ticket purchasers who attended each performance. Table 4 shows the race of each ticket purchaser who attended a Masterworks performance. On average, 75% of ticket purchasers who attended the performances self-identified as White, while 6% identified as Black or African-American. Eighty-five percent of ticket purchasers self-identified as White for Masterworks performances 3, 5, and 6. Opening night was an outlier for Asians at 35%; the performance for that evening featured Lang Lang, a renowned Chinese pianist.

**TABLE 3**

*Number and percent of purchasers who redeemed their tickets and selected a race, left the question blank, or chose not to respond for each Masterworks and Metro performance*

Performance	Selected a race		Blank		Choose not to respond		Total	
	n	%	n	%	n	%	n	%
<b>Carpenter Theater</b>								
Masterworks 1	213	28	506	67	40	5	759	27
Masterworks 2	88	42	100	47	24	11	212	8
Masterworks 3	155	31	319	64	24	5	498	18
Masterworks 4	157	61	79	31	20	8	256	9
Masterworks 5	102	43	103	43	33	14	238	9
Masterworks 6	128	53	88	37	25	10	241	9
Masterworks 7	149	61	77	32	18	7	244	9
Masterworks 8	174	51	136	40	32	9	342	12
Total	1,166	*46	1,408	*45	216	*9	2,790	100
<b>Randolph-Macon College</b>								
Metro 1	20	21	73	75	4	4	97	33
Metro 2	48	47	47	46	8	8	103	35
Metro 3	25	60	13	31	4	10	42	14
Metro 4	12	24	36	72	2	4	50	17
Total	105	*38	169	*56	18	*6	292	100

*Note.* All percentages are rounded to nearest whole number. Demographic data was not available for Rush Hour performances at Hardywood Craft Brewery.

\* indicates an average

Focusing on Metro performances at Randolph-Macon, for the 105 people who did select a race, 84% self-identified as White, 8% self-identified as Asian, 5% self-identified as Black or African-American, while 17% selected “other.” There were no purchasers who redeemed their tickets at Randolph-Macon performances who self-identified as Hispanic, American Indian or Alaskan

Native, and Native Hawaiian or other Pacific Islander. Table 5 highlights the race of ticket purchasers who redeemed by Randolph-Macon performance.

**TABLE 4***Race of ticket purchasers who redeemed by Carpenter Theater performance*

Performance	Black or African-American		Asian		White		Hispanic	
	n	%	n	%	n	%	n	%
Masterworks 1	5	2	74	35	114	54	7	3
Masterworks 2	6	7	8	9	67	76	3	3
Masterworks 3	6	4	10	6	131	85	5	3
Masterworks 4	10	6	14	9	128	82	2	1
Masterworks 5	4	4	7	7	87	85	2	2
Masterworks 6	3	2	6	5	109	85	4	3
Masterworks 7	15	10	24	16	99	66	6	4
Masterworks 8	26	15	8	5	124	71	5	3
Total	75	*6	151	*11	859	*75	34	*3

	American Indian or Alaskan Native		Native Hawaiian or other Pacific Islander		Other		Total	
	n	%	n	%	n	%	n	%
Masterworks 1	1	0	2	1	10	5	213	18
Masterworks 2					4	5	88	8
Masterworks 3					3	2	155	13
Masterworks 4					3	2	157	13
Masterworks 5					2	2	102	9
Masterworks 6	1	1	2	2	3	2	128	11
Masterworks 7					5	3	149	13
Masterworks 8	2	1	1	1	8	5	174	15
Total	4	*1	5	*1	38	*3	1166	100

*Note.* All percentages are rounded to nearest whole number.

\* indicates an average

**TABLE 5***Race of ticket purchasers who redeemed by Randolph-Macon performance*

Performance	Black or African-American		Asian		White		Hispanic	
	n	%	n	%	n	%	n	%
Metro 1			2	10	18	90		
Metro 2	1	2	3	6	44	92		
Metro 3	1	4	2	8	22	88		
Metro 4	1	8	1	8	8	67		
Total	3	*5	8	*8	92	*84		

	American Indian or Alaskan Native		Native Hawaiian or other Pacific Islander		Other		Total	
	n	%	n	%	n	%	n	%
Metro 1							20	19
Metro 2							48	46
Metro 3							25	24
Metro 4					2	17	12	11
Total					2	*17	105	100

*Note.* All percentages are rounded to nearest whole number.

\* indicates an average

Table 6 presents a summary of the number and percent of tickets purchased and tickets redeemed at Masterworks and Metro performances by race. Since race demographic data are not collected for Rush Hour performances, Hardywood Brewery was omitted from the table. At both venues nearly 16% of ticket purchasers who selected a race did not redeem their tickets at the performance. Race does not seem to be a factor in determining if a ticket will be redeemed; the percent of tickets

redeemed is similar, if not identical, to the percent of tickets purchased for each race.

## Age

On the Etix survey, ticket purchasers are asked to identify which age range reflected their age. Options are: under 28, 28-39, 40-54, 55-67, 68 or older, and Choose Not to Respond. We were not able to determine how these age ranges were selected. As stated earlier, the difference between choosing not to

respond and leaving the question blank may be meaningful. If “Choose Not to Respond” is selected, that individual purposefully chose to keep his/her age range private, while an individual who left the question blank may have made the decision not to respond to the question, they may have skipped non-mandatory survey questions, or may not have seen the question.

Table 7 shows the number of purchasers who redeemed their tickets who selected an age, left the question blank, or chose not to respond for each Masterworks and Metro performance.

Again, since demographic data was not available for Rush Hour performances, Hardywood Brewery was omitted from the table. On average, 52% of survey respondents for Masterworks performances chose to identify their age range compared to 42% of respondents who attended Metro performances.

Also, nearly half of the respondents chose not to respond to the survey question on age, and approximately 3% left the question blank. These response rates were opposite for the question on race, where half of the respondents left

**TABLE 6**

*Number and percent of tickets purchased and redeemed by purchasers by venue and race*

Race	Carpenter				Randolph-Macon			
	Purchased		Redeemed		Purchased		Redeemed	
	n	%	n	%	n	%	n	%
American Indian or Alaskan Native	4	0	4	0				
Asian	177	13	151	13	8	6	8	8
Black or African-American	102	7	75	6	6	5	3	3
Hispanic	46	3	34	3				
Native Hawaiian/ Other Pacific Islander	6	0	5	0				
Other	42	3	38	3	2	2	2	2
White	1,018	73	859	74	111	87	92	88
Total	1,395		1,166		127		105	

*Note.* All percentages are rounded to nearest whole number.

\* indicates an average



the question blank and about 8% chose not to respond (refer to Table 5).

For the 1,415 people who selected an age range, we disaggregated the data to see the age distribution for each performance (Table 8). The data show that on average 46% of the Carpenter Theater audience is under the age of 40, and 33% of your audience is over the age of 55. At Randolph-Macon, however, 35% of the audience is under 40 years

old, while 51% of your audience is over 55 years old.

Table 9 presents a summary of the number and percent of tickets purchased and tickets redeemed at Masterworks and Metro performances by age range. Since age demographic data is not collected for Rush Hour performances, Hardywood Brewery was omitted from the table. At both venues about 17% of ticket purchasers who selected an age

**TABLE 7**

*Age range of ticket purchasers who redeemed by Carpenter Theater performance*

Performance	Selected an Age		Blank		Choose not to respond		Total	
	n	%	n	%	n	%	n	%
Carpenter Theater								
Masterworks 1	233	31	20	3	506	67	759	27
Masterworks 2	102	48	10	5	100	47	212	8
Masterworks 3	169	34	10	2	319	64	498	18
Masterworks 4	170	66	7	3	79	31	256	9
Masterworks 5	117	49	18	8	103	43	238	8
Masterworks 6	150	62	3	1	88	37	241	9
Masterworks 7	159	65	8	3	77	32	244	9
Masterworks 8	198	58	8	2	136	40	342	12
Total	1,298	*52	84	*3	1,408	*45	2,790	100
Randolph-Macon College								
Metro 1	23	24	1	1	73	75	97	33
Metro 2	54	52	2	2	47	46	103	35
Metro 3	27	64	2	5	13	31	42	15
Metro 4	13	26	1	2	36	72	50	17
Total	117	*42	6	*2	169	*56	292	100

*Note.* All percentages are rounded to nearest whole number.

\* indicates an average

range did not redeem their tickets at the performance. Generally, age is not a factor in determining if a ticket is redeemed; the percent of tickets redeemed is similar, if not identical, to the percent of tickets purchased for each range with the exception of 28-39 year olds attending Metro performances, where there is a 6% decrease in tickets redeemed.

## Communities Served

The communities you seek to serve are Powhatan, Goochland, Hanover, Henrico, and Chesterfield counties, and Richmond City. According to the 2018 Census Bureau's American Community Survey (ACS) demographic growth estimates, these six areas had a combined population of 1,044,381 in 2018.

The total number of tickets sold to individuals living in these counties was calculated using the zip code identifier in the Etix database. This data can be

**TABLE 8**

*Age range of ticket purchasers who redeemed by performance*

Performance	under 28		28-39		40-54		55-67		68 or older		Total	
	n	%	n	%	n	%	n	%	n	%	n	%
Carpenter Theater												
Masterworks 1	47	20	47	20	61	26	40	17	38	16	233	18
Masterworks 2	20	20	36	35	18	18	19	19	9	9	102	8
Masterworks 3	29	17	35	21	39	23	40	24	26	15	169	13
Masterworks 4	45	26	51	30	30	18	31	18	13	8	170	13
Masterworks 5	26	22	24	21	26	22	25	21	16	14	117	9
Masterworks 6	26	17	38	25	39	26	28	19	19	13	150	12
Masterworks 7	67	42	26	16	24	15	26	16	16	10	159	12
Masterworks 8	19	10	47	24	42	21	59	30	31	16	198	15
Total	279	*22	304	*24	279	*21	268	*20	168	*13	1,298	100
Randolph-Macon												
Metro 1	1	4	5	22	2	9	8	35	7	30	23	20
Metro 2	5	9	14	26	11	20	15	28	9	17	54	46
Metro 3	4	15	9	33	3	11	6	22	5	19	27	23
Metro 4	2	15	2	15	2	15	3	23	4	31	13	11
Total	12	*11	30	*24	18	*14	32	*27	25	*24	117	100

*Note.* All percentages are rounded to nearest whole number.

\* indicates an average

compared to the 2018 Census Bureau’s American Community Survey (ACS) demographic growth estimates to show where your present audience resides and areas where new audiences can be cultivated.

For example, as Table 10 illustrates, although 33% of the population you seek to serve resides in Chesterfield County, the county represents 20% of ticket sales for Carpenter Theater performances, 14% of ticket sales for Hardywood performances, and 9% of ticket sales for Randolph-Macon performances.

have a combined racial profile of 0% American Indian or Alaskan Native, 4% Asian, 28% Black or African-American, 6% Hispanic, 0% Native Hawaiian or other Pacific Islander, and 62% White.

We used the Etix data you collected to provide a baseline for describing your current audience. We compared those data with 2018 demographic estimates from the Census Bureau’s American Community Survey database to provide a population context for understanding who you serve.

**TABLE 9**  
*Number and percent of tickets purchased and redeemed by venue and age range*

Age	Carpenter				Randolph-Macon			
	Purchased		Redeemed		Purchased		Redeemed	
	n	%	n	%	n	%	n	%
under 28	345	22	279	21	13	9	12	10
28-39	403	26	304	23	46	32	30	26
40-54	332	21	279	21	22	15	18	15
55-67	297	19	268	21	34	24	32	27
68 or older	184	12	168	13	27	19	25	21
Total	1,561		1,298		142		117	

*Note.* All percentages are rounded to nearest whole number.

Table 11 lists the percent of people by race on the 2018 Census Bureau’s American Community Survey (ACS) demographic growth estimates, which includes the average racial makeup for all six communities you serve. The six areas

We offer a caution, and with it a recommendation later in this report for adopting a different approach to data collection. As will become apparent, these data may be a weak portrait of the actual audience.

**TABLE 10***Number and percent of tickets sold at each venue by county*

County	Population		Carpenter		Hardywood		Randolph-Macon	
	n	%	n	%	n	%	n	%
Powhatan	28,574	3	118	1	0	0	10	1
Goochland	22,482	2	188	1	3	0	36	3
Hanover	104,449	10	587	5	45	5	376	28
Henrico	325,642	31	4,940	38	294	32	379	28
Chesterfield	339,447	33	2,529	20	128	14	121	9
Richmond City	223,787	21	2,822	22	286	31	159	12
Other			1,683	13	54	6	265	20
No Response			0	0	106	12	0	0
Total	1,044,381		12,867		916		1,346	

*Note.* All percentages are rounded to nearest whole number.**TABLE 11***Number and percent of tickets sold at each venue by county*

County	American Indian or Alaskan Native	Asian	Black or African- American	Hispanic	Native Hawaiian or other Pacific Islander	White
Powhatan	0	0	11	2	0	87
Goochland	0	1	16	3	0	80
Hanover	0	2	9	3	0	87
Henrico	0	8	30	6	0	57
Chesterfield	0	3	23	9	0	68
Richmond City	0	2	48	7	0	45
Average	0	4	28	6	0	62

*Note.* All percentages are rounded to nearest whole number.







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### 3

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# BACKGROUND

In this chapter we present six best practices for audience diversification in the arts, an overview of organizational project management, and a framework for managing the change process.





## SECTION 3 PART I

# AUDIENCE DIVERSIFICATION

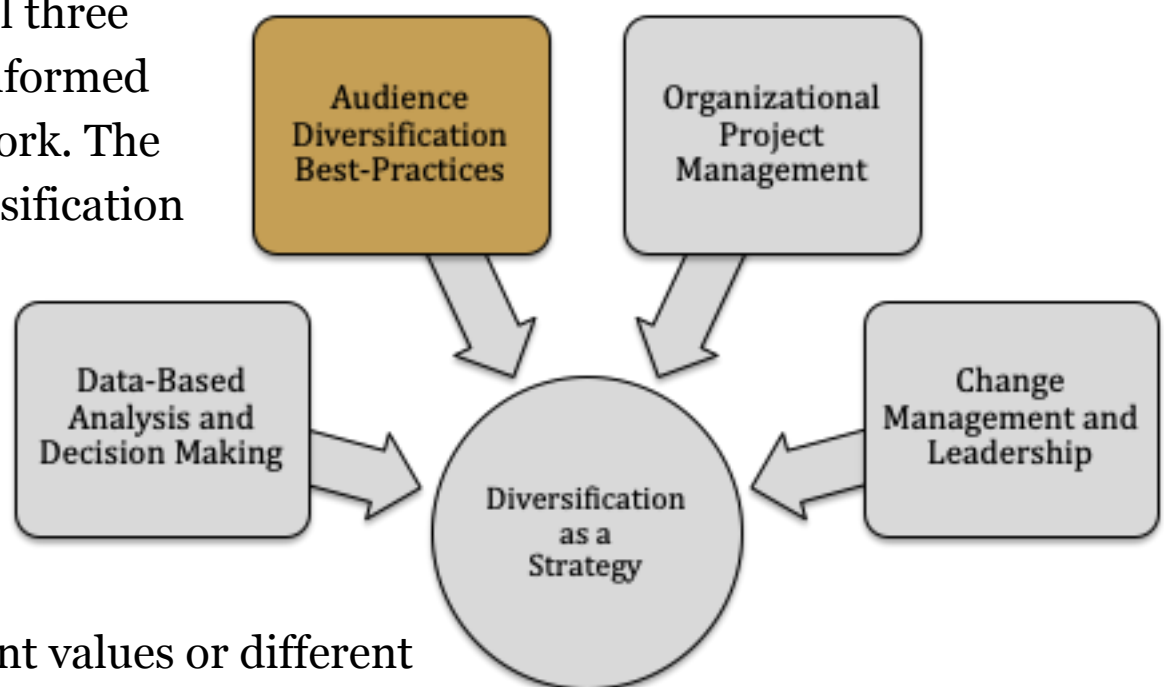
*“Dig through the literature for gems that are more useful than the original article.”*

Dr. Sergio Chaparro, Ph.D.

### Prepare for Audience Diversification

The literature review involves three components: audience diversification best practices, organizational project management, and change management. We have reviewed the literature in all three areas to identify research informed practices to support your work. The first steps in audience diversification are identifying the major driver for diversification, informing next steps, and recognizing that there are multiple benefits.

Although each member of your team may have different values or different feelings regarding the implementation of the



diversification efforts, a unified organizational approach is necessary. Sinek points out that the clearer the values driving the change, the more likely the buy-in.<sup>13</sup> Knowing your *why* for audience diversification helps establish a sense of urgency and a sincere purpose for moving forward.

We reviewed research and practice literature for the best strategies for audience diversification. After a thorough review, we were able to group these strategies into the following six themes: establishing a solid foundation, identifying who you are serving, developing meaningful relationships, purposeful marketing and programming, preparing for success, and measuring your success.

## 1. Establish Solid Foundation

Experts in the audience diversification field agree that organizations attend to three critical areas: an inclusive vision and mission, organizational commitment, and strategic planning.<sup>14</sup> These three elements are essential for an organization to achieve audience diversification.

### Inclusive Vision And Mission

Successful audience building is guided by an inclusive vision to promote diversity and equitable outcomes. To attract new audiences, arts organizations

must be purposeful in creating core values based on the shared commitment of all stakeholders. The message of inclusiveness must reflect the heart of the organization both internally and externally.<sup>15</sup>

Samuel Fleisher, director of the Fleisher Art Memorial in Philadelphia, in response to a rapid decline in the audience base of the organization, went on a quest to make art accessible to all. Their strategic goal involved revising their vision and mission to promote a sense of community collaboration among different cultures and bringing people of diverse backgrounds to experience on-site programs geared towards teens and children in their neighborhoods. This initiative was to attract residents in highly populated areas of ethnically diverse neighborhoods to build on preexisting relationships with community groups, share information to the community about their offerings, and employ community liaisons. This resulted in an 11% increase in student participation. The efforts of the Fleisher Art Memorial were successful in part because the director led the way and secured buy-in from organizational members to get results.<sup>16</sup>

### Create Organizational Commitment

Successful audience development is an intensive process and requires you to

have patience and persistence. Moving forward in your efforts will require organizational commitment from all stakeholders. In the publication, *Opening the Door to Entire Community: How Museums Are Using Permanent Collections to Engage Audiences*, the researchers embarked on an initiative dedicated to audience building strategies at 29 museums across the country.<sup>17</sup> As a result of a roundtable discussion that included six of the 29 museum directors, the study concluded:

“Chartering a new course for audience development cannot be the passion of a museum director or its marketing or education department. It requires the commitment of the entire institution to conduct business in new ways that reach far beyond the walls of the museum.”<sup>18</sup>

Building and creating organizational commitment to audience diversity may require many hard conversations and certainly requires scheduled, organization-wide time for these conversations. Any audience diversification effort requires a thorough examination of historical exclusionary practices, whether conscious or not, that have discouraged some people from attending events, while encouraging others. An internal review of biases and stereotypes must be addressed to successfully commit to the process of attracting a more diverse audience in the

communities you seek to serve.<sup>19</sup> Considering this is a difficult process, especially because stakeholders may want to delay, even if they are onboard, this examination is best led by someone experienced in helping organizations work through these issues. With an external guide for the process, it may be easier to move forward from flight (ignore or postpone until a “better time”) or fight (argue about whose fault this really is) mentalities to initiate the audience diversification work. If this is a leadership priority, then it will be easier to get to the work.

## Strategic Planning

*Increasing Cultural Participation* is a guide to help arts organizations start the process of audience building. Initial steps to the process are:

- Develop a comprehensive profile assessing your history, programs, services, infrastructure, current resources, and audience.
- Conduct an overall assessment to help you avoid costly ineffective measures that hinder the momentum from achieving desired goals.
- Create a planning committee that is not only representative of the community you seek to serve, but also has the ability or influence to engage all stakeholders within your organization.<sup>20</sup>

Specific action steps can successfully launch audience diversification efforts by accessing where you are currently and provide a clearer picture of where you need to invest your resources. If you have already started your initiative, reevaluate your current efforts to ensure the appropriate resources are in place.

An audit of resources and current

financial gain and into developing programs and opportunities that speak to the cultural backgrounds and interests of those targeted. It requires creating opportunities to connect with your communities through a cultural experience that captures shared interests.<sup>21</sup> You must seek to understand in order to create those shared opportunities; it is necessary to understand the interests of the new audiences, who they are, and what they

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*“It is necessary to understand the interests of new audiences, who they are, and what they care about.”*

---

audiences can provide information to determine a baseline of current audience engagement levels and assist with your development of effective audience development goals that align strategies with your vision and mission. By evaluating current resources and audiences, you can identify weaknesses and strengths to determine the best strategies for attracting a new audience.

## 2. Get to Know Your Present and Future Audiences

Seeking additional audience participation requires moving beyond

care about.

Experts suggest the utilization of informal and formal approaches to learning about a new audience. Informal approaches include conducting research by initiating discussions with staff, advisory committees, and community members; formal approaches include focus groups and surveys.<sup>22</sup> The Steppenwolf Theatre Company conducted formal research to identify ways to strengthen their relationship with current audience members by conducting focus groups. The focus groups helped gather information about

the targeted group and revealed that single ticket buyers had a sense of loyalty to the theatre. The company acted on this knowledge and created opportunities which offered more meaningful experiences for this particular group that catered specifically to their intellectual desires. The theatre invested in online and in-person engagement activities for single ticket buyers which resulted in stimulating conversations about the performance even after the performance. Their efforts proved to be successful; over a three-year period, 61% more tickets were purchased by non-subscribers.<sup>23</sup> Utilizing research to gain a clearer picture of your current audience and potential new audiences offers valuable information on their behaviors which will direct efforts towards ensuring the intended diversification goals are attainable.<sup>24</sup> You must be strategic in your selection of the particular audience you seek to serve. Being knowledgeable of barriers and motivators of engagement can assist in devising tactics to overcome the challenges to establishing sincere relationships.

### 3. Build Meaningful Relationships

Many individuals experience the arts by way of their social connection with families, friends, churches, schools, businesses, and many other community organizations.<sup>25</sup> Walker-Kuhne states

that organizations must offer something to bring people to the table; this is an even bigger challenge now because groups have established their own means of satisfying their cultural experiences and encompassing their interests and cultural heritages.<sup>26</sup> If you are seeking to establish connections with the community, place the community as the focal point of your efforts, provide opportunities to show the importance of your art, and show how your two groups can become active partners in the process.<sup>27</sup>

The Clay Studio, Fleisher Art Memorial, and Minnesota Opera, three arts organizations highlighted in the Road to Results, were determined to break down barriers that hindered the opportunity to engage newcomers by strategically setting the course and providing multiple ways in.<sup>28</sup> All three organizations targeted their specific group of interest and devised strategies to build a bridge and extend the invitation by providing accesses to their art forms that had not existed in the past.<sup>29</sup> The Clay Studio and the Fleisher Art Memorial provided changes in their programming that provided easy access to their newcomers by allowing the newcomers to sample their art form in their neighborhoods, share the experience with family and friends, and feel a sense of familiarity within their own space. The Minnesota Opera sought



to ensure their selected target audience of women, ages 35 to 60, became familiar with the art form by dispelling elitist perceptions and establishing relationships with a local women's talk show.<sup>30</sup> All three organizations were strategic in establishing diversification by finding common ground to attract new attendees as well as maintain existing audiences.

Establishing meaningful relationships with newcomers brings value and purpose to each group; it must be a reciprocal experience with both parties benefiting.<sup>31</sup> You can ensure all people have equal access to cultural opportunities by building meaningful relationships with trusted leaders within the community, establishing avenues for engagement, and creating partnerships.

## 4. Purposeful Marketing and Strategic Programming

Successful marketing and strategic programming will help in the audience diversification building process by removing negative connotations associated with your organization and replacing them with the positive experiences you bring to the community. Effective marketing and programming strategies will unite you and your products and services with all of the various engagement levels in the community, from novice to expert. These strategies will then create a mutual

respect between entities and an inviting environment for you to share your products for well into the future. A purposeful marketing strategy begins with effective planning.

## Market Purposefully

Well thought out marketing plans are essential to achieving audience building goals. Marketing involves learning the needs of customers and constituents, both prospective and current, and designing strategies to meet those needs.<sup>32</sup>

Start small; do only what you are able to feasibly do, then build on your success. For example, post on your target audience's social media pages, sponsor a culturally specific community event, and/or display flyers, in their language, in their community gathering places.<sup>33</sup>

Marketing can be used for many different reasons in building initiatives but, overall, purposeful marketing leads to changed behavior. To establish long lasting relationships, evaluate your current marketing strategies that address messages being sent through marketing research, communication, and outreach opportunities, and design ways to overcome marketing challenges.<sup>34</sup>

## Program Strategically

One of the primary goals in an audience building initiative is increasing both the number and diversity of

participants in all levels of participation in arts activities, from novice to experienced.<sup>35</sup> This is accomplished by providing programming, services, incentives, and information that inspires everyone, no matter their experience in the art, to increase their level of participation in and around the arts community.<sup>36</sup> In order to develop strategies to increase the audience, review current programming.

## 5. Prepare for Your Success

You must prepare for your continued success and the issues which accompany it. The challenges and growing pains are different for each organization and initiative and are difficult to predict. You should anticipate such trials as organizational strain, time to coordinate internally, and dissent between your staff, current audience, and new initiatives, all while considering how to sustain your audience building efforts and developing mutual appreciation for everyone involved in the process.

### Anticipate Organizational Strain

There are many resource draining activities within organizations, such as hiring, training, marketing, self-governance, staff motivation, and budgeting.<sup>37</sup> No doubt this change in culture will bring anxiety and perhaps even some resistance; most change does.

Large organizations have the resources but may have a difficult time with buy-in for the initiative from within. Small organizations may lack resources and the additional workload that accompanies changing direction toward a new initiative could be overtaxing. The strain on your organizational capacity will present a challenge. It must be ensured that new audience members have a positive first experience, while also determining the best way to message subsequent marketing to them. This occurs while not ignoring the present membership.

### Permit Dissension Between Staff, Audience, And Initiatives

Success in the audience building process may also lead to friction among your staff and current audience members as they adapt to serve a new audience. For any number of reasons, your staff may question the increased number of newcomers.<sup>38</sup> It may be because they are uncertain of the organization's artistic direction, uncertain how to serve multiple different audiences, or just a general discomfort with the unknown.<sup>39</sup> Respectful communication is key.

### Other Considerations For Sustaining Internal Efforts

You must determine the extent of resources to use to maintain the audience

diversity building process. Committing resources to this process requires assessing all internal and community assets.<sup>40</sup> A way to determine if the organizational capacity is prepared to meet projected needs is through a survey, to be completed by leadership and staff, designed to assess whether different organizational aspects are excellent,

organization to see the strategy to success.<sup>42</sup> Your employees must understand the importance of the strategy change and implications to the organization, and all of the leaders and staff need to know their roles and responsibilities in support of the audience development process. In order for this to occur, your organizational

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*“It is not about management giving step-by-step instructions to be carried out; rather, it is about creating conversations about individual roles among every employee in the organization to see the strategy to success.”*

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sufficient, or insufficient to meet both present and proposed needs.<sup>41</sup>

### *Commit To The Strategy.*

Audience building cannot be a side assignment, an additional activity to core projects. In order for any proposed strategy to be successful, it must go beyond marketing and education. All employees must take ownership in the strategy and make it important to themselves. It is not about management giving step-by-step instructions to be carried out; rather it is about creating conversations about individual roles among every employee in the

strategy must reflect the importance of audience building and diversity, and be seen and understood by everyone taking part in the audience development process;<sup>43</sup> in other words, everyone in the organization.

### *Understand The Limitations To Implementation.*

Staff time and organizational dollars are not the only limitations to your desire to implement a diverse audience building process; leadership, community visibility and reputation, and knowledge of the target populations are also necessary resources.<sup>44</sup> It should be

noted, though, that you may be considered an asset in working with one target population and a liability in working with another.

A lack of external collaboration is one way diversification efforts can be hindered. Ineffectiveness in establishing strategic collaborative opportunities with other organizations and individuals may create a limitation in implementation of audience building programs.<sup>45</sup> These alliances can be established through long-term joint efforts or shorter-term projects or programs. The formation of community advisory committees, for instance, is a way to collaborate efforts to develop programs designed to appeal to a target population.<sup>46</sup> Working with artists, arts organizations, and community organizations can be developed to attain goals in the audience diversification process.

## Establish Mutual Appreciation

Audience loyalty is not earned merely through the distribution of free tickets. A foundational understanding, built through relationships, of why free or discounted tickets are available gives value to the audience diversity building process.<sup>47</sup> Complimentary tickets should be distributed with the understanding that they are an investment in an ongoing relationship and building institutional strength.<sup>48</sup> Creating value establishes

mutual appreciation by promoting your purpose and helping the audience feel as if they are an active participant in the relationship.<sup>49</sup> Establishing audience loyalty is an essential consideration when developing goals as part of the audience diversification building process.

## Show Thanks

Show gratitude to all those who helped create your successful audience diversification building campaign; expressing appreciation is essential in an audience development initiative. When an audience or community feels you are sincere in your actions, respect is created.<sup>50</sup> Communicating thankfulness to all those who helped in the audience diversification building process (e.g., community members who gave feedback, present audience members) will create a willingness by the community to support you.<sup>51</sup> A sincere thank you goes far in successful completion of an audience development initiative.

## 6. Success Metrics

Identifying what success means for you and how to measure that success are critical questions to be determined before an evaluation program can be implemented.<sup>52</sup> Establishing a methodology to effectively measure success is an important component of audience development and ensuring the strategies being utilized achieve the

quantified results.<sup>53</sup> Knowing who to ask and what questions to ask are essential not only to assess critical indicators but also assess the validity of the information being used to measure progress.<sup>54</sup> Select an evaluative tool based on your organizational needs and ensure the staff is trained on how to efficiently use the tool.<sup>55</sup> Incorporating a system to measure and monitor your efforts can have many benefits. A successful evaluative tool can be a valuable asset when it is utilized to:

- provide feedback about progress and bring about the call for change<sup>56</sup>
- assess current trends in your present and targeted audiences not only to determine a baseline for programming, but also to measure success towards accomplishing new goals<sup>57</sup>
- provide benchmarks to monitor engagement levels on a regular basis to capture gaps and growths in audience development initiatives<sup>58</sup>

Creating systems for documenting efforts is essential for consistent monitoring and determining next steps. Connolly and Cady state “documentation is a key component of evaluation.”<sup>59</sup> “Documentation enables an arts organization to tell its story, learn from its experience, and preserve information about what it did.”<sup>60</sup> Evaluation is a continuous cycle; measuring and

monitoring must be embedded in all facets of the organizational initiative. Audience diversification takes commitment, time, resources, and a plan of action to be successful and see results. Success metrics are only useful if they are utilized with fidelity and an intentional means for bringing about sustainable change.

The best practices above detail the six themes to follow to diversify your audiences. The steps focus on the specific work to complete with each target audience group. The next two sections, Organizational Project Management and Change Management, focus on how to approach your audience diversification efforts.

## SECTION 3

### PART II

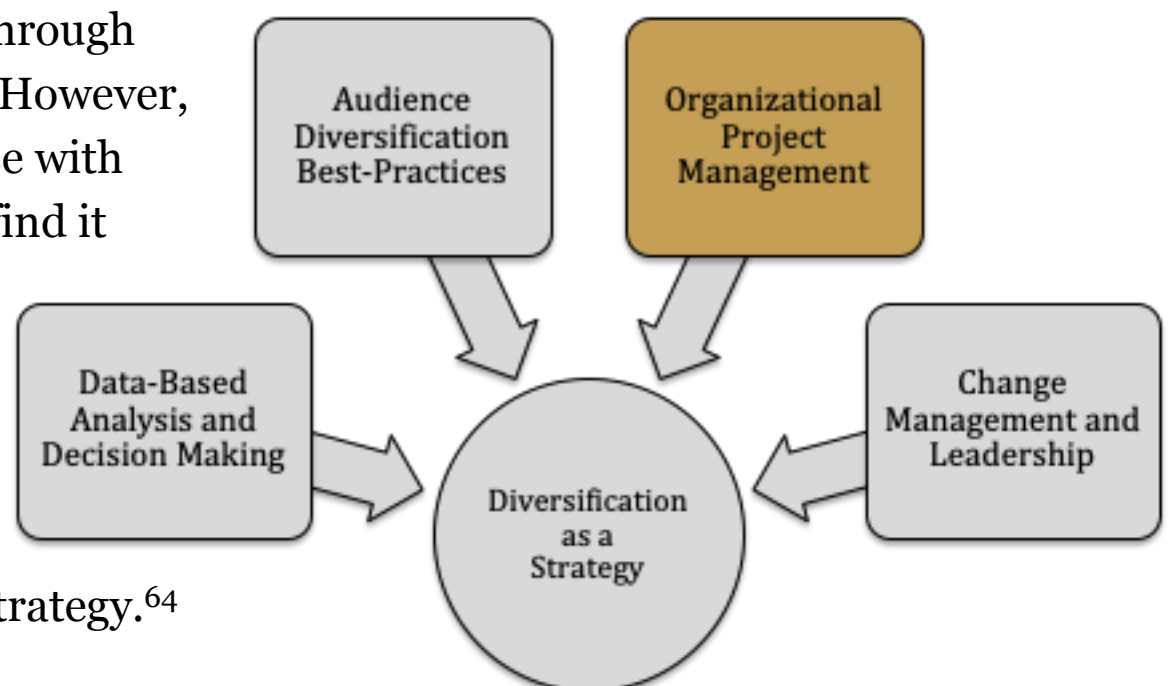
# ORGANIZATIONAL PROJECT MANAGEMENT

*“All strategic change happens through projects and programs.”*

The Project Management Institute

#### Implement a Tailored Organizational Project Management Framework

An organization’s vision is an aspirational statement about what it would like to achieve; a mission statement explains its purpose; and strategic objectives are long-term goals that are aligned with the vision and mission; together, they represent an organization’s strategy.<sup>61</sup> “All strategic change happens through projects and programs.”<sup>62</sup> However, small organizations or those with 20-100 employees<sup>63</sup> often find it challenging to implement their strategy because they do not have the process infrastructure in place to efficiently and effectively execute on the strategy.<sup>64</sup>





## Defining Organizational Project Management

Organizational Project Management (OPM) is a tailorable framework that leverages portfolio, program, and project management, feedback loops, and enabling processes to help organizations of all types and sizes achieve their strategic objectives.<sup>65</sup> Figure 1 below shows how the key elements of the framework are interconnected.

## Components of Organizational Project Management

**Portfolio management** is the discipline of managing a group of programs, projects, and operational activities to achieve strategic objectives.

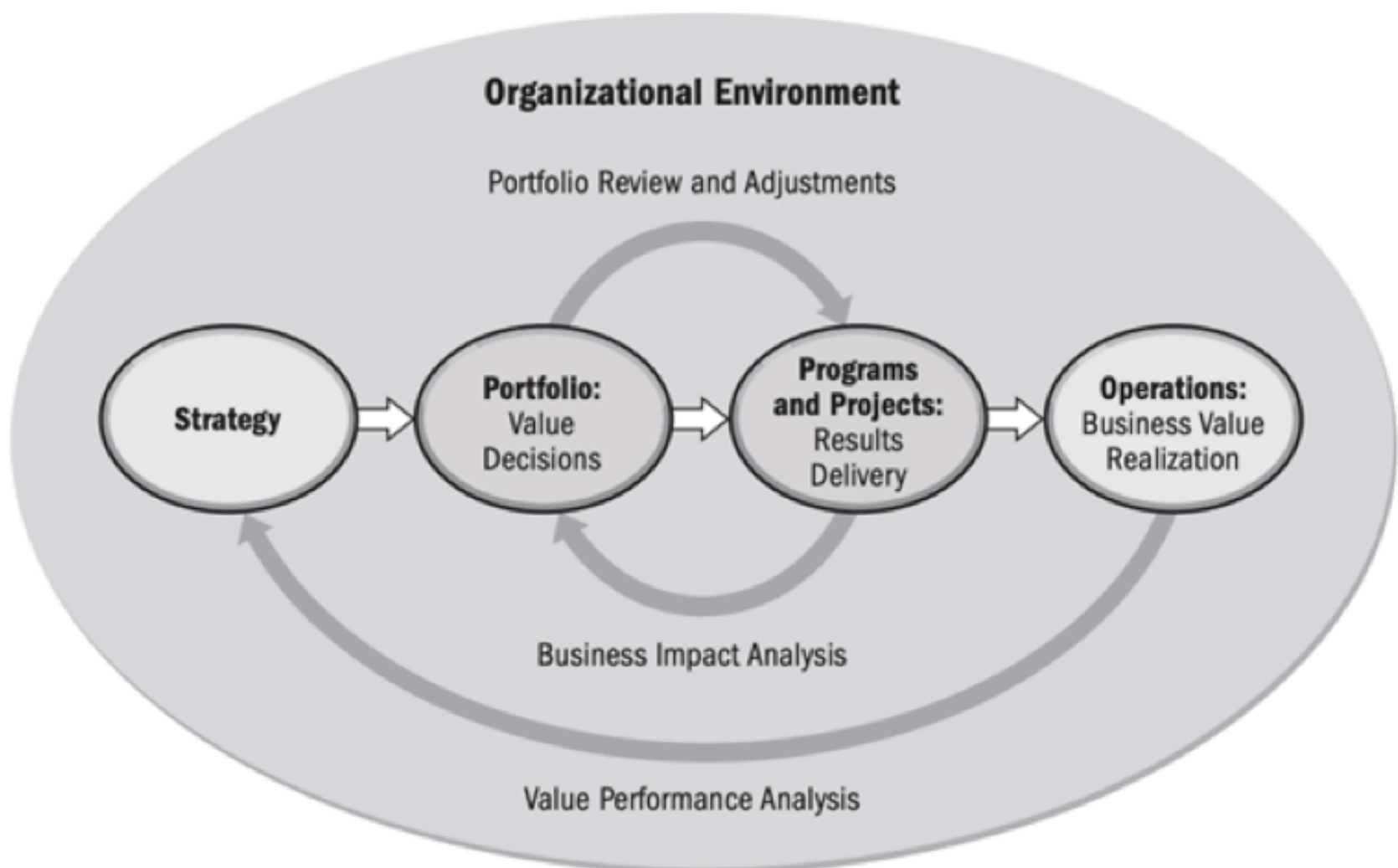
<sup>67</sup> Organizations may have more than one portfolio for each strategic goal.<sup>68</sup>

**Program management** is the discipline of managing a group of projects and operational activities.<sup>69</sup>

Organizations obtain increased benefits

**FIGURE 1**

*Organizational Project Management (OPM) Framework*



*Note. OPM is a framework that enables organizations to achieve their strategic objectives.<sup>66</sup>*

by managing program components collectively rather than individually.<sup>70</sup> Lastly, **project management** is the discipline of applying a methodology to create a product or service or achieve a desired result within cost, quality, and schedule requirements.<sup>71</sup>

**Portfolio value decisions** are decisions made by an oversight committee that ensures the initiatives the organization is working on are aligned with its strategic objectives.<sup>72</sup>

**Programs and projects** ensure the initiatives are executed in a way that delivers business value.<sup>73</sup> The operations team then operationalizes the work the project team delivered on and measures the actual business value achieved.<sup>74</sup>

**Business impact analysis** analyzes the overall value of the implementation of related projects and programs.<sup>75</sup> The business impact analysis along with other data is leveraged to determine if adjustments to the portfolio are warranted.<sup>76</sup> Finally, **value performance analysis** leverages business value data from operations for strategy decisions.<sup>77</sup>

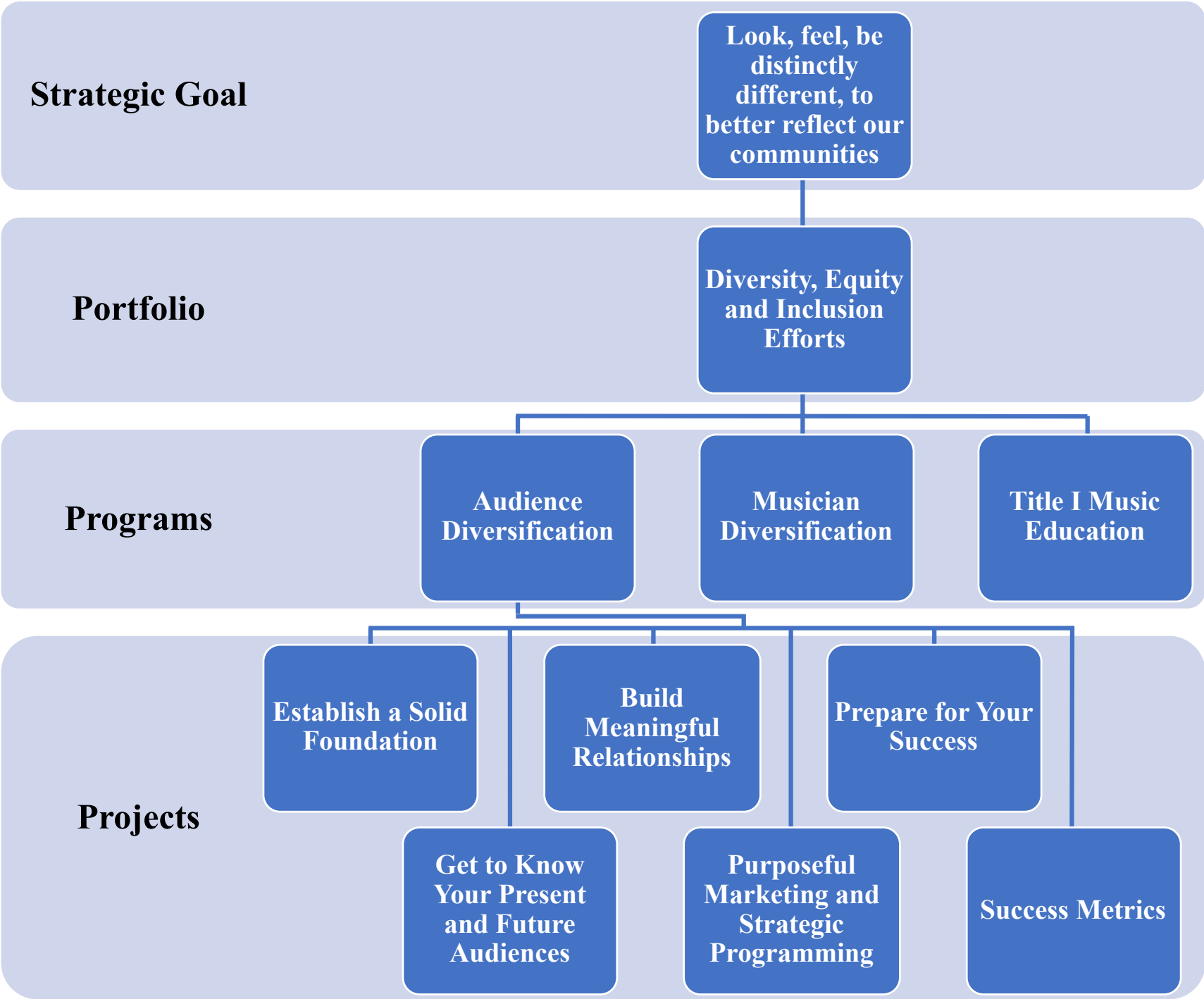
An example of how OPM could connect your diversity and inclusion strategic goal and portfolio with related programs is shown in Figure 2. The Audience Diversification program includes the six-step best practices projects that should be completed with each target audience group.

At the portfolio level, the OPM Oversight Committee should confirm that the programs and projects you are working on are aligned with your strategic objective. At the program and project level, the oversight committee should confirm: you have structured the programs and related projects in a way that will deliver maximum business value once implemented; each project achieves the business value you expected; whether or not adjustments should be made to the portfolio; the business impact or overall value achieved after implementing all of the projects within a program; and whether or not adjustments should be made to your strategy.

## Benefits of Organizational Project Management

Organizations that implement an OPM framework see numerous benefits, including: the ability to better align strategy and execution; improved decision-making; increased project productivity; enhanced communications; and predictable project performance.<sup>78</sup> An OPM framework will help an organization achieve “better performance, better results, and a sustainable competitive advantage.”<sup>79</sup>

**FIGURE 2**  
*An example of connecting your diversity and inclusion strategic goal and portfolio to projects and programs using OPM*



# Implementing Organizational Project Management

The Project Management Institute (PMI) recommends a three-step process to implement an OPM framework:<sup>80</sup>

1. Program formulation
  - a. Create the OPM vision and business case
  - b. Evaluate the vision and business case for feasibility including return on investment, willingness to commit resources, and change readiness
2. Program planning
  - a. Identify key individuals and their roles and responsibilities
  - b. Establish program oversight
  - c. Determine future state capabilities
  - d. Complete a gap analysis between the current and future states to determine the work that needs to be done and create the plan
  - e. Update the vision and business case, if needed
  - f. Review and approve the plan
3. Program implementation
  - a. Implement the plan
  - b. Measure success
  - c. Modify the plan as needed

The OPM framework is designed to align with your existing systems, structures, and culture. A list of key oversight committee responsibilities and an oversight committee charter are located in the Implementation Guide.

## Project Management in Small Organizations

Project management methodologies are usually based on the Project Management Institute's five process groups or project phases: initiating, planning, executing, monitoring and controlling, and closing.<sup>81</sup> We reviewed nine commercially available project management methodologies (outlined in the Implementation Guide), however, we determined that traditional methodologies such as these are not always applicable to small organizations as the methodologies are often resource intensive.<sup>82</sup> Nevertheless, according to Kim Sutton, Director of the Foundation for Social Improvement, "nonprofits that don't use some type of methodology severely limit their ability to thrive."<sup>83</sup> Project management tools and templates for small enterprises are available in the Implementation Guide. The Project Management Institute's Education Foundation also offers resources for non-profit organizations.

Organizations that implement an OPM framework should expect to see dramatic improvements in project

performance. For example, organizations with a higher level of project management maturity have a 92% rate of success reaching their project goals, where organizations with a lower level of project management maturity have a 33% success rate.<sup>84</sup> Success is defined as projects that meet or exceed objectives, are completed on or ahead of schedule, and delivered at or under budget.<sup>85</sup> Another study also concluded that the adoption of program and portfolio management increases the chances of project success in terms of schedule, quality, scope, budget, and time.<sup>86</sup>

## Other Half of the Success Equation

Project management methodologies, processes, and tools help teams effectively determine and implement the right solutions.<sup>87</sup> However, simply arriving at the right solutions is not sufficient to ensure that performance is improved or results are achieved.<sup>88</sup> Change management methodologies, processes, and tools help teams ensure stakeholders buy into and ultimately adopt the solutions.<sup>89</sup> Teams need to leverage both project management and change management methodologies in order to sustain change.<sup>90</sup>

## SECTION 3

### PART III

# CHANGE MANAGEMENT

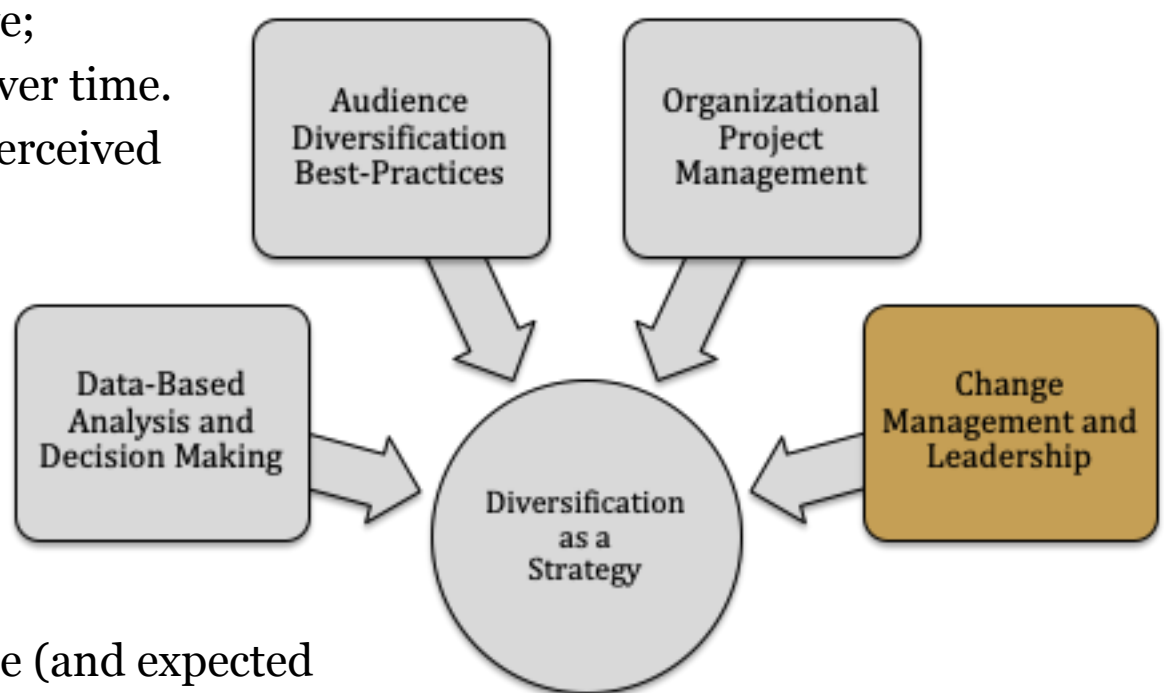
*“Change management is the application of processes and tools to manage the people-side of change from a current to a new future state ”*

Jeff Hiatt and Timothy J. Creasey

The Association of Change Management Professionals (ACMP) states that change is “the transition from a current to a future state.”<sup>91</sup> Reactions to a change can be positive, neutral, or negative; reactions can also change over time. In reality, change is often perceived negatively.

**“Change management** is the application of processes and tools to manage the people-side of change from a current to a new future state so that the

desired results of the change (and expected return on investment) are achieved.”<sup>92</sup> Although change management is often associated with internal activities that focus on getting





employees on board with a change, it is a discipline that can and should be leveraged with both internal and external stakeholders. Internal stakeholders are your employees, contractors, managers, and members of the board.<sup>93</sup> External stakeholders are the suppliers, customers, creditors, competitors, governments, and communities who are indirectly affected by your work.<sup>94</sup>

According to Prosci's research, the top seven factors ensuring change management success are:<sup>95</sup>

1. Senior leaders are actively involved in the change effort; in fact, "projects with extremely effective sponsors met or exceeded objectives more than twice as frequently as those with ineffective sponsors"<sup>96</sup>
2. The change team is leveraging a change management model
3. The organization ensures the right resources and funding have been allocated to the change effort
4. Employees leading the change effort regularly communicate information about the change
5. Employees are actively involved in and support the change
6. Change management and project management efforts are integrated
7. Middle managers are actively involved in the change effort<sup>97</sup>

## Importance of Change Management

Change management is important because it helps organizations drive strategy execution through OPM and accelerate change so transitions are shorter and benefits are realized more quickly.<sup>98</sup> Without change management, 70% of projects fail.<sup>99</sup> Prosci's 2018 Best Practices in Change Management study showed that of the respondents who had excellent change management programs in place:

- 93% met or exceeded objectives; they were six times more likely to meet objectives than projects that had poor or no change management in place
- 78% finished on or under budget
- 69% finished on or ahead of schedule<sup>100</sup>

"When change management is done well, people feel engaged in the change process and work collectively towards a common objective, realizing benefits and delivering results."<sup>101</sup>

## Change Management Models

There are numerous change management models available for practitioners to use. In fact, we conducted a Google Scholar search using the phrase "change management models" and received 2,350 results. Researchers have attempted to categorize change

models, but there is little consensus in academic research on what methodologies to use for specific circumstances.

However, Prosci's research shows that organizations select change models primarily based on their ease of use.<sup>102</sup> Factors related to ease of use include easy to implement, easy to understand, easy to communicate to others, simple, practical, structured and systematic, logical, and comprehensive and holistic.<sup>103</sup>

the guiding coalition; developing a vision and strategy; communicating the change vision; empowering broad-based action; generating short-term wins; consolidating gains and producing more change; and anchoring new approaches in the culture.<sup>105</sup> Stages one through four focus on breaking down the current state of circumstances; stages five through seven on implementing the change; and stage eight on sustaining the change.<sup>106</sup> Kotter emphasizes organizations must go through all eight stages sequentially;

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*“Successful transformation is 70% - 90% leadership and 10% - 30% management.”*

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We evaluated ten change management models outlined in the Implementation Guide for their applicability to your audience diversification efforts and ease of use. We determined John Kotter's Eight-Stage Process of Creating Major Change and the Association for Change Management Professionals Change Management process are two approaches that meet the criteria. Kotter developed the eight-stage process based on his consulting experience with 100 companies going through significant change.<sup>104</sup> The eight stages are: establishing a sense of urgency; creating

operating in multiple stages is acceptable once stage one is well underway. Revisiting previous stages is also acceptable.<sup>107</sup> Kotter found that “successful transformation is 70% - 90% leadership and 10% - 30% management.”<sup>108</sup> The Implementation Guide includes a list of strategies related to the eight stages for senior leaders to follow.

The ACMP developed a change management process that is aligned with many of the existing change management methodologies and practices but is not a methodology in and of itself; the process is meant to be a guide for change

management practitioners to use as they work on projects.<sup>109</sup> The process is centered on five process groups: evaluate change impact and organizational readiness; formulate the change management strategy; develop the change management plan; execute the change management plan; and complete the change management plan.<sup>110</sup> The process is much more detailed than any of the models we studied which we believe would be incredibly useful for organizations that have limited change management experience. The Implementation Guide includes a detailed flowchart and accompanying templates to guide you through the change process.





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## 4

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# RECOMMENDATIONS

In this chapter we use the stakeholder definitions, literature review, and data analysis to tailor a diversification plan to the Richmond Symphony's needs with remarkable specificity.



## SECTION 4

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# RECOMMENDATIONS

*“You cannot create a diverse audience until you  
have created a diverse organization.”*

Dr. James Wiznerowicz, D.M.A.

We have nine recommendations for you to consider as you work to diversify your audience and promote inclusion and equity within your current audience base.

Organizations that have been successful in audience development initiatives have the following commonalities: shared vision, openness to change, connection with the targeted community, commitment for a purpose, organizational capacity, and resources available to support change. Our recommendations are research-based best practices.

- Data-Based Analysis and Decision-Making
- Audience Diversification Best Practices
  - Establish a Solid Foundation
  - Get to Know Your Present and Future Audiences
  - Build Meaningful Relationships
  - Purposeful Marketing and Strategic Programming
  - Prepare for Your Success
  - Success Metrics
- Implement a Tailored OPM Framework
- Implement Change Management Models



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## *Data-Based Analysis and Decision-Making*

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Currently, the Symphony utilizes Etix as your method of collecting and analyzing demographic data. The ability to accurately capture audience demographic data is key to the Symphony achieving its Diversity and Inclusion strategic objective. Establishing a methodology to effectively document audience characteristics is an important component of audience development. The current design does not adequately document either ticket buyers or attendees.

The current Etix data collection methods limit the Symphony's ability to capture demographic data that can be used to inform their audience diversification strategic goal and the current response rate is not sufficient to generalize to the audience base. Currently, only ticket purchasers are given the survey. The number of respondents is too low to accurately understand the audience as a whole.

The current survey does not collect which county the respondent resides in. Demographic data is not collected at all classical repertoire venues.

## Priorities

Design or adopt the survey that includes data points that align with the strategic objective (exact age or date of birth, county of residence, option to identify race or races).

Use the new survey at the time of each classical repertoire performance that is linked to an interactive data visualization tool, such as a dashboard (see Implementation Guide).

Provide every person in attendance the opportunity to respond. Develop incentives to encourage response.

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## *Establish a Solid Foundation*

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At the start of our engagement, the Richmond Symphony's Leadership Team was experiencing significant turnover: four senior staff members and the music director.

We believe this turnover can be leveraged as an opportunity to strengthen the Symphony's commitment to diversity. The research shows that organizations need to have three components in place to successfully establish a foundation for audience diversification: create an inclusive vision and mission, secure organizational commitment, and develop a strategic plan.

The Symphony has made a great start by establishing the ABC and DEI committees. However, the Symphony's vision and mission do not reference diversification.

The Symphony is perfectly primed to aggressively pursue diversification efforts not only within their audience, but also across all levels and initiatives of the organization.

## Priorities

Revise the vision and mission to align or include diversity, equity, and inclusion goals.

Add organizational core values to mission and vision statements.

Personify the vision, mission, and values at every level of the organization and stakeholders.

The senior leadership team assumes the role of embedding diversity into all aspects of the organization and would be charged with tightly aligning organizational strategy that encompasses audience diversification goals (race, age, etc.).

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## *Get to Know Your Present and Future Audience*

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You have stated that you want to diversify your audience to be inclusive of the communities you seek to serve to

include more participation across age ranges, racial backgrounds, and a designated geographic area (Chesterfield, Goochland, Hanover, Henrico, Powhatan, Richmond City).

The current audience base does not accurately reflect the diversity of these communities. There is insufficient information on the interests of people you hope to serve, why these communities are not active members of the Symphony, and what these communities might want from the Symphony.

You must seek to understand the barriers and take initial steps to address the problems that exist within the communities you seek to serve and make the necessary connections to start the dialogue to bridge the gap and extend the invitation.

In 2018, the NDP report on engagement by 30 residents in the Richmond area concluded that these residents were not involved because the Symphony does not impact the majority of people, some people do not like coming downtown, and there is a lack of awareness of what you are doing. This report, while helpful, is not inclusive of the geographic, age, and racial dimensions of the audience you seek to serve.

## Priorities

Revamp the Community Council with a mission for action. Identify contacts and outreach activities for Community Council members to gather information about why target communities are not involved and what might help these communities become involved. Establish a process for reporting your findings back to your staff.

Initiate a process, such as in-house focus groups, to gather feedback from not only the current audience base, but also from community members who do not participate

Assign an ambassador in the underserved areas.

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## *Build Meaningful Relationships*

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The current data shows that diverse areas have populations that are less likely to attend symphony events. Although you have established partnerships with local communities, schools, and businesses, you lack strong and meaningful connections with the “target” communities you seek to serve.

You solicited the Genworth Corporation in December 2012 to conduct qualitative research with local volunteer groups. The findings include the following barriers to engagement:

lack of awareness, venue and surroundings, perceptions of exclusivity, website, and current advertising vehicles not reaching audiences, and customer comfort level. By continuing to address these barriers you can move forward with your diversification efforts.

## Priorities

Authentically communicate with target communities with the goal of serving them, listen to why they are not involved, understand what would induce involvement, and determine what they would bring to the table to add to your mission and programming.

We suggest focus groups, surveys, and individual interviews using Twitter, email, telephone, and face-to-face methods to gather feedback on barriers of engagement.

Contacts and entry can happen through developing programming and services within these communities.

Seek out local community organizations, churches, sororities, fraternities, museums, and businesses owned, operated, and geared towards people of color.

Ensure the Community Council resembles the communities you seek to serve to engage the underserved communities to create lasting and meaningful relationships.

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## *Purposeful Marketing and Strategic Programming*

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A member of the DEI committee remarked, “seems to me that the image of the symphony is a bunch of white guys in white ties playing on a darkened stage for a bunch of ladies with blue hair.” An examination of your marketing materials reinforces this stereotype.

Marketing directed toward the current audience is not likely to bring in a more age-race-geographic diverse audience. The marketing efforts must be expanded to incorporate those audiences you wish to attract so they can place themselves in the audience with people who look like them.

Currently, while your social media exhibits age, race, and gender diversity, your print and website media lack the same inclusivity. More diversity-inclusive marketing shows consistency with your stated strategic goal and creates an atmosphere of diversity throughout the entire organization.

### **Priorities**

Assess current programming and marketing endeavors. Assure your media shows diversity, especially to the populations you seek to attract. The Implementation Guide shows photo samples presently used in your print and

online media. If you wish to attract Blacks, show Blacks in your marketing media, and the same can be said for Hispanics, Asians, and other races and cultures.

Use audience survey and geographic demographic data to focus marketing efforts. The data gathered from audience surveys, for example, can be used not only to tell who was in your audience but can tell you if your attempt at attracting a diverse audience from a specific community was successful.

Communicate a new image by creating a simple, concise statement which tells what you do and what makes you unique from other organizations (positioning statement).

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## *Prepare for Your Success*

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“If you always do what you’ve always done, you’ll always get what you’ve always got.” – Anonymous

We anticipate potential resistance to the changes that will be made as a result of your audience diversification efforts including resistance related to:

- programming changes from the ABC and DEI committee members, Board of Directors, corporate sponsors, current audiences, musicians, and Youth Orchestra Program students and families



- job roles and responsibilities changes from the ABC and DEI committee members, Leadership Team, musicians, and staff
- feelings of not belonging from target audience groups
- establishing partnerships, working with the Symphony from community members, and organizations

## Priorities

Anticipate increased organizational strain, time to coordinate internally, and dissent between the organization's staff, current audience, and the new initiatives.

Remind all that it is coming.  
Remark often that these things are part of the change process.

Build in internal coordination processes and timelines.

Develop specific activities to express mutual appreciation for everyone involved in the process.

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## *Success Metrics*

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Audience diversification is a long-term process that requires continuous monitoring to determine progress toward a goal. Measures must be developed along with a process for collecting the necessary data, not only to determine movement but also to assess

the effectiveness of particular change strategies.

While your 2016-2020 Strategic Plan identifies audience diversity as a strategic goal, no specific benchmarks and outcomes have been established. Once agreement on these specific goals and outcomes is in place, there are currently no systems in place to be able to measure progress. Until these elements are in place, there is no means to accurately measure if your audience diversification process is effectively helping achieve your strategic goal.

## Priorities

Develop Richmond Symphony specific audience diversification strategies, goals, and implementation timelines.

Identify what data is necessary to determine if benchmarks are being met.

Develop data collection processes that provide the right data at the right time.

Ensure the staff is trained on how to efficiently use data collection tools and report results.

Provide a clear picture of progress towards audience diversification goals for continuous improvement and sustainability

Celebrate milestones and make your progress public.

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## *Implement a Tailored Organizational Project Management Framework*

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You have articulated your vision, mission, and strategic goals, i.e. your strategy, however, you do not have the processes in place to efficiently or effectively achieve your audience diversification objectives.

Given that “all strategic change happens through projects and programs,”<sup>111</sup> it is important for you to put the necessary systems and structures in place to be successful.

Organizations with a higher level of project management maturity have a 92% success rate, where organizations with a lower level of project management maturity have a 33% success rate<sup>112</sup> (success is defined as projects that meet or exceed objectives; are completed on or ahead of schedule; and delivered at or under budget).

## **Priorities**

Leverage the Senior Leadership Team as an oversight committee for your Audience Diversification work.

Establish oversight committee responsibilities and corresponding processes; an example of OPM oversight committee responsibilities is in the Implementation Guide.

Create a detailed OPM implementation and monitoring plan to guide your efforts; the Project Management Institute’s recommended approach is outlined in the Implementing Organizational Project Management section of the report.

Secure buy-in from key stakeholders.

Form a small Audience Diversification Team to begin work on your first diversification project and assist with implementing the OPM framework; easy to use project management templates are located in the Implementation Guide.

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## *Incorporate Change Management Models into Audience Diversification Efforts*

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Your audience diversification efforts are incredibly challenging and expected to take ten years or longer to reach.<sup>113</sup> As mentioned above, we expect that you will experience a significant amount of resistance to the changes that will be made.

While OPM focuses on determining the right solutions, change management methodologies, processes, and tools help teams ensure internal and external



stakeholders buy into and ultimately adopt the solutions. Teams need to leverage both OPM and change management methodologies in order to sustain change.<sup>114</sup>

In addition, Prosci's 2018 Best Practices in Change Management study showed that of the respondents who had excellent change management programs in place: 93% met or exceeded objectives meaning that projects with excellent change management in place were six times more likely to meet objectives than projects that had poor or no change management in place; 78% finished on or under budget and 69% finished on or ahead of schedule.<sup>115</sup>

Lastly, change management is important because it helps organizations drive strategy execution through OPM and accelerate change so transitions are shorter and benefits are realized more quickly.<sup>116</sup>

## Priorities

Leverage John Kotter's Eight Stage Process of Creating Major Change and the Association for Change Management Professionals' (ACMP) Change Management Process with each of your Audience Diversification projects.

Review Kotter's model outlined in the Change Management Models section of the report.

Review Kotter's list of leadership strategies and ACMP's Change Management Process flow chart, which can be found in the Implementation Guide.

Determine the activities needed in order to be successful; we recommend you consider completing all of the steps in both models for the first project.

Embed the activities selected into the project schedule.

Leverage the change management templates in the Implementation Guide as you move forward.



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## 5

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# RESOURCES

To make taking the first steps in implementing the recommendations easier, we offer several resources to help in the diversification process, including books, field experts, community contacts, and available technology.



## SECTION 5

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# RESOURCES

*“Diversity is America’s most valuable resource. It is what makes us the most innovative nation on Earth.”*

Nick Hanauer

### Implementation Guide

- To assist in implementing our recommendations, we have compiled an Implementation Guide which can be accessed via the following website:  
**<https://sites.google.com/mymail.vcu.edu/implementation-guide>**

### Books

- Increasing Cultural Participation: An Audience Development Planning Handbook for Presenters, Producers, and Their Collaborators
- Invitation to the Party: Building Bridges to the Arts, Culture and Community by Donna Walker-Kuhne
- Leading Change by John Kotter
- Making Sense of Change Management by Esther Cameron and Mike Green
- Managing Change in Organizations: A Practice Guide by PMI

- The Standard for Organizational Project Management (OPM) by Project Management Institute
- UC Berkeley Change Management Toolkit
- Attention Economy: Understanding the New Currency of Business by Davenport and Beck

## Experts in the Field

- Bob Harlow, social psychologist and statistician specializing in market research, including designing, implementing, and disaggregating audience surveys.
- Donna Walker-Kuhne, acknowledged as the nation's foremost expert in Audience Diversification by the Arts & Business Council.
- Mike Green, author, leadership and change specialist providing coaching, consulting, and training to individuals, teams, and organizations.

## Local Community Contacts

- Enjoli Moon, marketing and social media specialist and founder & creative director of the Afrikana Independent Film Festival.
- Pearl Wise Crawley, Director of Advancement at the Black History Museum & Cultural Center in Richmond.

## Other Resources

- ArcGIS, a geographic information system for working with maps and geographic information maintained by ESRI. The program allows you to layer information from a database and add your own data points.
- Association for Change Management Professionals
- Google DataStudio Dashboard
- Google Form survey with responses linked to a Google Sheet
- Project Management Institute's Educational Foundation
- The Regional Arts and Culture Council
- The Wallace Foundation
- U.S. Census and American Community Survey (ACS) data

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From left: Verona Wilborn, Frank Weber, Jim Perkins, Keith Claassen

## ABOUT THE AUTHORS

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This capstone team is a living testimony to the unique power that exists in diversity.

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